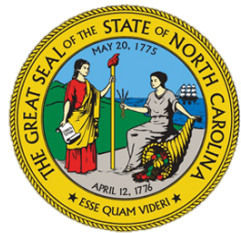# North Carolina Immunization Registry (NCIR)

Reminder Recall

User Guide

Last Updated: January 14, 2022

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

Overview

Overview

What is the North Carolina Immunization Registry (NCIR)?

The **North Carolina Immunization Registry (NCIR)** is a secure, web-based clinical tool which is the official source for North Carolina immunization information. Immunization providers may access all recorded immunizations administered in North Carolina, regardless of where the immunizations were given.

The purpose of NCIR is:

- To give patients, parents, health care providers, schools and child care facilities timely access to complete, accurate and relevant immunization data;

- To assist in the evaluation of a child's immunization status and identify children who need (or are past due for) immunizations;

- To assist communities in assessing their immunization coverage and identifying areas of under-immunization.

Now, let's get started!

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Request Reminder

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Reminder

Request Reminder

- Used to generate reports, letters, address labels, or a client listing for clients "active" in the organization.

- Unlike the Assessment report, the Request Reminder reports will show client specific information.

Reminder Recall Report will help to...

- Determine which clients are not up to date with their immunizations.

- Provide a fast way to run a report with all the contact information for those clients that need to come back in.

- Improve immunization rates because you will be able to keep your clients up to date.

How to Run the Request Reminder Report

Production Region 7.8.1

General
system user manual

Maintenance
manage users
manage sites
manage clinicians
manage physicians
manage schedules
manage schools
mass vax definition

Inventory
manage inventory
manage orders
manage transfers
shipping documents
request transaction sum
request vaccine usage
request wasted/expired
inventory report

Clients
manage client
mass vax grid entry

Immunizations
manage immunizations

Reports
request reminder
check reminder status
request callback
request new client form
request casa extract
check request status
request vfc reports
check vfc status
assessment report
check assessment

Click on **the request reminder** link under the *Reports* section.

How to Run the Request Reminder Report

Private Providers

Select vaccine group. The default is set to required vaccines.
You can add or remove additional vaccines as necessary.

Type in your birth date range.

Click **Generate** when done.

How to Run the Request Reminder Report

Local Health Department

Step 1. Select the Client Population.

Step 2. Select vaccine group. The default is set to required vaccines. You can add or remove additional vaccines as necessary.

Step 3. Type in your birth date range.

Step 4. Select Generate.

How to Run the Request Reminder Report

Status Report

Reminder Request Status							
Started	**Completed**	**Status**	**Clients**	**Eligible**	**Birth From**	**Birth To**	Refresh / Cancel
07/27/2009 04:32 PM		QUEUE			01/02/2006	01/01/2007	

Reminder Output Status
No Reminder Outputs Logged

Stage 1: Click **Refresh.**

Reminder Request Status							
Started	**Completed**	**Status**	**Clients**	**Eligible**	**Birth From**	**Birth To**	Refresh / Cancel
11/19/2007 12:33 PM		10 %			10/01/2005	10/01/2007	

Reminder Output Status
No Reminder Outputs Logged

Stage 2: Loading.

Reminder Request Status							
Started	**Completed**	**Status**	**Clients**	**Eligible**	**Birth From**	**Birth To**	Refresh / Cancel
07/27/2009 04:32 PM	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007	

Reminder Output Status
No Reminder Outputs Logged

Stage 3: Completed.

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How to Run the Request Reminder Report

Request Reminder Process Summary

___Reminder Request Process Summary___		
Step	**Criteria Evaluated at this Step**	**Clients**
1	Clients that are **active or inactive** for *SIX FORKS DEPOT*.	36
2	Clients that are **active** for *SIX FORKS DEPOT*.	32
3	Clients from Step 2 that are **born between 01/02/2006 and 01/01/2007.**	8
4	Clients from Step 3 that meet the following criteria: • **County** is not specified; • **School** is not specified; • **Provider** is not specified; • **Weeks Since Last Notice** is not specified.	8
5	Clients from Step 4 that meet the following criteria regarding vaccination status: • Clients that are **Recommended or Overdue** for one or more vaccinations **as of 07/27/2009**; • Use the following **vaccine groups: DTP/aP, HepB, Hib, MMR and Polio**; • Use for all clients. • **Exclude Overdue Reminders** is not specified	4
6	Clients from Step 5 that meet the following criteria. • Have one or more **responsible persons**; • At least one responsible person **receives notices**; • **City** is not specified • **Zip Code** is not specified	2
	Total Number of Clients Eligible for Reminder	2
7	Clients from Step 5 that are omitted from Step 6: Omitted Clients	(2)

How to Run the Request Reminder Report

Request Reminder Process Summary:
Part 1

Reminder Request Process Summary

Step	Criteria Evaluated at this Step	Clients
1	Clients that are **active or inactive** for *SIX FORKS DEPOT*.	36
2	Clients that are **active** for *SIX FORKS DEPOT*.	32
3	Clients from Step 2 that are **born between 01/02/2006 and 01/01/2007.**	8
4	Clients from Step 3 that meet the following criteria: • **County** is not specified; • **School** is not specified; • **Provider** is not specified; • **Weeks Since Last Notice** is not specified.	8
5	Clients from Step 4 that meet the following criteria regarding vaccination status: • Clients that are **Recommended or Overdue** for one or more vaccinations **as of 07/27/2009;** • Use the following **vaccine groups: DTP/aP, HepB, Hib, MMR and Polio;** • Use for all clients. • **Exclude Overdue Reminders** is not specified	4
6	Clients from Step 5 that meet the following criteria. • Have one or more **responsible persons;** • At least one responsible person **receives notices;** • **City** is not specified • **Zip Code** is not specified	2
	Total Number of Clients Eligible for Reminder	
7	Clients from Step 5 that are omitted from Step 6:	Omitted Clients

Click on **Omitted Clients.**

Then, Click **Refresh.**

Reminder Request Status

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
07/27/2009 04:32 PM	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007

Refresh

Cancel

When your report is ready click on the '**Omitted Clients**' link.

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Omitted Clients	Omitted Clients	07/27/2009 04:49 PM	07/27/2009 04:49 PM	07/27/2009 04:49 PM	Ready

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Request Reminder Report: Omitted Clients

How do I fix the Omitted Clients?

Take the omitted list and the client query list and "clean up" those records as much as possible.

1. Print the omitted client list

2. Go back to Manage Client

3. Add the responsible person information

Report run on: 24 July 2009

Reminder / Recall - Incomplete Address
Omitted Clients
SIX FORKS DEPOT

Page 1 of 1

Client Name (L, F M)	Birth Date:	Chart Number:
TEST, ANEW	12/31/2006	
TEST, TEST TEST	01/21/2006	5
ZEROFOURSEVEN, CRONE	05/04/2007	

Notice this client has a chart number.

Request Reminder Report: Omitted Clients

Search by client, chart numbers or mother's maiden name. Then, select "**Find**".

Go back to "**Manage Client**". Take the first client on your "**Omitted Clients**" list and enter the info into the Client search screen.

Request Reminder Report: Omitted Clients

Request Reminder Report: Responsible Person Information

"Notice" informs providers if reminder letter will be generated.

Note that the √ has been removed from the "**Notices?**" box.

Note the last updated information.

Request Reminder Report

Reminder Request Status

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
07/27/2009 04:32 PM	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007

Refresh

Cancel

Click the report link which is underlined in blue.

Type in the name of the report.

Reminder Request Output Options

Output	Description	Additional Input	
Client Query Listing	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name	
Reminder Letter	Standard Reminder Letter.	Report Name	
		Free Text	Please make sure to bring any insurance information on your next visit
		Phone #	919-707-5550
Reminder Card	Standard Reminder Card (4x5).	Report Name	
		Free Text	Please make sure to bring any insurance information on your next visit
		Phone #	919-707-5550
Mailing Labels	Avery Mailing Labels.	Report Name	
Client Extract	A .txt file of clients eligible for reminder based on the report criteria. Includes omitted clients.	Report Name	

NOTE: Fields marked with an asterisk * are required.

Request Reminder Report

Request Reminder Report

Questions to Consider:

•Are there any active duplicate clients under my organization?

•Have all doses administered been keyed into NCIR?

•Have keyed doses been entered correctly?

•Are there clients that need to be made inactive?

Request Reminder Report: Client Query Listing

Back

			117 BULL RUN	ITHACA, WI 53810
PEGGY PERSON - 08/15/1992	RPXX2		117 BULL RUN	ITHACA, WI 53810

Vaccine	Recmd Day	Immunization Dates
HepA	08/15/1993	
HepB	08/15/1992	
Influenza	Contraindicated	
MMR	Contraindicated	
Meningo	08/15/2003	
Polio	03/01/1995	1) 01/01/1995
Td	02/01/2008	1) 01/01/2002 (NV) 2) 01/01/2008
Tdap/Pertussis	Complete	1) 01/01/2008
Varicella	Contraindicated	

Look for "blank" records.

Look for not valid (NV) shots.

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Request Reminder Report: Client Query Listing

Report run on: 07/27/2009 05:14 PM   **Client Query Listing**   Page 1 of 1

Client Name (F M L)	Chart Number	Phone Number	Address	City/State/ZIP
TEST ME - 07/01/2008	9		5601 six forks road	RALEIGH, NC 27609
			5601 six forks road	RALEIGH, NC 27609
		(919) 707-5580		NC
		(919) 707-5580		NC

Vaccine	Recmd Day	Immunization Dates
DTP/aP	10/01/2009	1) 09/09/2008 2) 11/19/2008 3) 01/09/2009
HepA	01/06/2010	1) 07/06/2009
HepB	Contraindicated	1) 09/22/2008
Hib	08/03/2009	1) 09/09/2008 2) 11/19/2008 3) 02/03/2009
Influenza	04/03/2010	1) 02/03/2009 2) 04/03/2009
MMR	07/01/2009	
Meningo	07/01/2019	
PneumoConjugate	09/01/2008	
Polio	07/01/2012	1) 09/09/2008 2) 11/19/2008 3) 02/03/2009
Varicella	07/01/2009	

| TESTER TESTDELETE - 01/10/2006 | | (919) 707-5580 | 5601 six forks road | RALEIGH, NC 27609 |

Vaccine	Recmd Day	Immunization Dates
DTP/aP	03/10/2006	
HepA	01/10/2007	
HepB	01/10/2006	
Hib	03/10/2006	
Influenza	11/10/2009	1) 11/12/2007 2) 12/17/2007 3) 11/10/2008
MMR	01/10/2007	
Meningo	01/10/2017	
PneumoConjugate	03/10/2006	
Polio	03/10/2006	
Varicella	01/10/2007	

Look for duplicate addresses.

Enter historical doses.

Request Reminder Report: Client Query Listing

Don't forget to report duplicates to the NCIR Help Desk!

| CHRISTOPHE MICHAELS - 04/06/2006 | | 111 CYPRESS ST | CHARLOTTE, NC 28227 |

Vaccine	Recmd Day	Immunization Dates
DTP/aP	06/06/2006	
HepA	04/06/2007	
HepB	04/06/2006	
Hib	06/06/2006	
Influenza	10/06/2006	
MMR	04/06/2007	
Meningo	04/06/2017	
PneumoConjugate	06/06/2006	
Polio	06/06/2006	
Varicella	04/06/2007	

| CHRISTOPHER MICHAELS - 04/06/2006 | | 111 CYPRESS ST | CHARLOTTE, NC 28227 |

Vaccine	Recmd Day	Immunization Dates
DTP/aP	06/06/2006	
HepA	04/06/2007	
HepB	04/06/2006	
Hib	06/06/2006	
Influenza	10/06/2006	
MMR	04/06/2007	
Meningo	04/06/2017	
PneumoConjugate	06/06/2006	
Polio	06/06/2006	
Varicella	04/06/2007	

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Request Reminder Report: Client Query Listing

Client Evaluation:

- Responsible Persons: NC address and TX address

- No doses entered since 2006

- Received confirmation from parent that patient now lives in Texas

- Moved or Gone Elsewhere (MOGE)

BRITTANYA O'CAMPO - 09/16/2006 660			(651) 125-1252	89680 CAMPUS AVE 8756 YELLOW ROSE LANE	CHARLOTTE, NC 28214 DALLAS, TX 77714
Vaccine	**Recmd Day**	**Immunization Dates**			
DTP/aP	02/04/2007	1) 12/04/2006			
HepA	09/16/2007				
HepB	03/16/2007	1) 09/20/2006 2) 12/04/2006			
Hib	02/04/2007	1) 12/04/2006			
Influenza	03/16/2007				
MMR	09/16/2007				
Meningo	09/16/2017				
PneumoConjugate	02/04/2007	1) 12/04/2006			
Polio	02/04/2007	1) 12/04/2006			
Rotavirus	Max Age Exceeded	1) 12/04/2006			
Varicella	09/16/2007				

Request Reminder Report: Client Query Listing

Change status to "**Inactive**" to inactivate client.

Request Reminder Report: Unable to locate

Inactivate client when the below three are met:

1. The client has not been seen by your office in the last 12 months

2. All available telephone numbers are no longer valid (disconnected or family no longer associated with number)

3. A postcard and/or letter has been returned as undeliverable and no other address information is known

Run Request Reminder!

Any time you edit client information (i.e. demographics, shot info.) the Request Reminder report must be run again in order to reflect the changes you have made.

Request Reminder Report - How To Generate Reminder Letters

Free text will be added here and will appear at the bottom of the letter.

Request Reminder Report

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
24-35 mos	Reminder Letter	07/27/2009 05:57 PM	07/27/2009 05:57 PM	07/27/2009 05:57 PM	Ready

Report Link

Request Reminder Report - Sample Reminder Letter

Back
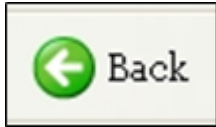
Dear Beth Quinn,

Our records indicate that Tester Testdelete, has received the following immunizations:

Immunizations History		
Immunization	**Date Administered**	**Series**
Influenza	11/12/2007	1 of 2
Influenza	12/17/2007	2 of 2
Influenza	11/10/2008	Booster

Our records also show that Tester may be due for the following immunizations. If Tester received these or other immunizations from another health care provider, please call our office so that we can update Tester's record. Otherwise please take Tester to a health care provider to receive them.

Vaccines Recommended by Selected Tracking Schedule	
Vaccine	**Date Needed**
HepB	01/10/2006
DTP/aP	03/10/2006
PneumoConjugate 7	03/10/2006
Polio	03/10/2006
Hib	03/10/2006
HepA	01/10/2007
MMR	01/10/2007
Varicella	01/10/2007
Influenza	11/10/2009
Meningo	01/10/2017

The number for our office is: 919-707-5550

Please make sure to bring any insurance information on your next visit

Free text added

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# Request Reminder Report

Free text will be added here and will appear at the bottom of the card.

Request Reminder Report Status

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
24-35 mos	Reminder Card	07/27/2009 06:04 PM	07/27/2009 06:04 PM	07/27/2009 06:04 PM	Ready

Report is "**ready**"
Click on link to view.

Request Reminder Report Status - Sample of Reminder Card

Back

Dear Beth Quinn,

Our records show that Tester Testdelete may be due for the following immunizations. If Tester received these or other immunizations from another health care provider, please call our office so that we can update Tester's record. Otherwise please schedule an appointment for Tester to receive them.

Vaccine Group	Date Needed
HepB	01/10/2006
DTP/aP	03/10/2006
PneumoConjugate 7	03/10/2006
Polio	03/10/2006
Hib	03/10/2006
HepA	01/10/2007
MMR	01/10/2007
Varicella	01/10/2007
Influenza	11/10/2009
Meningo	01/10/2017

Reminder card should be placed in an envelope to be HIPPA Compliant.

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Request Reminder Report Status – Mailing Labels

Production Region 7.8.1

General
system user manual
Maintenance
manage users
manage sites
manage clinicians
manage physicians
manage schedules
manage schools
mass vax definition
Inventory
manage inventory
manage orders
manage transfers
shipping documents
request transaction sum
request vaccine usage
request wasted/expired
inventory report
Clients
manage client
mass vax grid entry
Immunizations
manage immunizations
Reports
request reminder
check reminder status
request callback
request new client form
request casa extract
check request status
request vfc reports
check vfc status
assessment report
check assessment

Reminder Request Status   Refresh   Cancel

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
07/27/2009 06:10 PM	07/27/2009 06:12 PM	100 %	12	10	12/02/2002	01/01/2009

Reminder Request Output Options

Output	Description	Additional Input
Client Query Listing	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name
Reminder Letter	Standard Reminder Letter.	Report Name / Free Text: Please make sure to bring any insurance information on your next visit / Phone # 919-707-5550
Reminder Card	Standard Reminder Card (4x5).	Report Name / Free Text: Please make sure to bring any insurance information on your next visit / Phone # 919-707-5550
Mailing Labels	Avery Mailing Labels.	Report Name
Client Extract	A .txt file of clients eligible for reminder based on the report criteria. Includes omitted clients.	Report Name

NOTE: Fields marked with an asterisk * are required.

Mailing Labels can be generated using the Standard Avery labels.

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Request Reminder Report Status - View Report

Name	Type	Requested	Started	Completed	Status
Reminder Output Status					
[0-72 mos]	Mailing Labels	07/27/2009 06:13 PM	07/27/2009 06:13 PM	07/27/2009 06:13 PM	Ready

Click on link to view report.

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Request Reminder Report Status - Sample Labels

Mailing Labels

Back
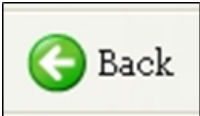
QUINN NANCY M FIRSTNAMETEST 5601 SIX FORKS ROAD RALEIGH NC 27609	REMIND TEST REMIND TEST 5 RALEIGH NC 27609	MOMMA QUINN TESTCF TETSCL 5601 SIX FORKS ROAD RALEIGH NC 27609
QUINN TEST ME 5601 SIX FORKS ROAD RALEIGH NC 27609	PERSON TEST REMIND TEST 5601 SIX FORKS ROAD RALEIGH NC 27609	BETH QUINN TEST THREE 5601 SIX FORKS RALEIGH NC 27699
QUINN TEST ME 5601 SIX FORKS ROAD RALEIGH NC 27609	BETH QUINN ROTAVIRUS TEST 5601 SIX FORKS ROAD RALEIGH NC 27609	BETH QUINN TEST1 VFC 5601 SIX FORKS ROAD RALEIGH NC 27609
ADAM NCIR ADAM NCIR ROAD RALEIGH NC 27609	QUINN ROTAVIRUS TEST 5601 SIX FORKS ROAD RALEIGH NC 27609	

Mailing Labels correspond with reminder cards and letters generated.

Request Reminder Report

How to get the Most From Reminder Recall

- Enter all children into the NCIR

- Enter historical immunizations *(properly and completely)*

- Check the '*Notices*' box for at least one responsible person

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Strategies for Improving Immunization Rates

- Prioritize vaccinations in terms of staff responsibilities and communication among _ALL_ staff members

- Check immunization status at every visit

- Give all needed vaccinations at each visit

- Educate parents

Strategies for Improving Immunization Rates Continued..

- Document any adverse reactions or contraindications to vaccines

- Consolidate immunization records

- Document attempted communication in patient record

- Inactivate clients that are no longer seen at your office or MOGE (moved or gone elsewhere)

- Schedule next visit before client leaves office

- Use Reminder/Recall

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Where to Go for More Help?

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Questions?

Contact your Regional Immunization Program Consultant (RIC)
The RIC Coverage Map with contact information is located on the Immunization Branch website:
https://www.immunize.nc.gov/contacts.htm

NC Vaccines Help Desk
1-877-873-6247
(Monday – Friday 7:00 AM – 7:00 PM ET and Saturday 8:00 AM – 4:00 PM ET)
https://ncgov.servicenowservices.com/csm_vaccine?id=immunizations&sys_id=69f035b11b037c9099510f6fe54bcbee

Appendix

NCIR Roles

NCIR Role	Role Definition	Corollary Role in CVMS
Reports Only	This person in NCIR is only able to search for clients and view/print client specific records.	N/A
Typical User	Person who can manage, including add and edit, clients in NCIR, as well as manage inventory and ordering. This role also has all of the functionality of the Reports Only role.	Healthcare Provider
Inventory Control	Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.	N/A
Administrator	Person who can manage organization users, sites, and clinicians in NCIR. They run practice-level reports, including reminder/recall. This role also has all of the functionality of the Reports Only, Typical User, and Inventory Control roles.	Location Manager